

Message Text

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ACTION EB-07

INFO OCT-01 EUR-12 ISO-00 AID-05 CIAE-00 COME-00 FRB-01

INR-07 NSAE-00 USIA-15 TRSE-00 XMB-04 OPIC-06 SP-02

CIEP-02 LAB-04 SIL-01 OMB-01 AGR-10 AGRE-00 /078 W

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R 231519Z SEP 76

FM AMEMBASSY WARSAW

TO SECSTATE WASHDC 4102

INFO AMEMBASSY MOSCOW

AMEMBASSY OTTAWA

AMEMBASSY STOCKHOLM

UNCLAS WARSAW 6848

FOLLOWING CABLE SENT USDA ON 21 SEPT 1976 BEING REPEATED FOR
YOUR ACTION/INFO:

QUOTE

UNCLAS 21 SEPTEMBER 1976

TOFAS 179

SUBJ: POLISH GRAIN SITUATION

PASS GRAIN & FEED DIV/FCA AND OILSEEDS AND PRODUCTS/FCA

1. SUBJECT: IMPORT INTENTIONS: DURING AGATT/MURRAY VISITS TO GOP
MINAG AND ROLIMPEX ON 16 AND 17 SEPT, SOME CLARIFICATION OF POLISH
GRAIN PRODUCTION AND IMPORT INTENTIONS WAS OBTAINED.

2. IT APPEARS THAT REPORTS OF INTENDED IMPORTS OF 7 MMT OF FEED-
STUFFS CONSIST OF ABOUT 5 MMT WHEAT AND FEEDGRAINS, PLUS ABOUT
1 MMT OILSEEDS AND PRODUCTS -- THE LATTER BEING CONSIDERED
APPROXIMATELY 2 MMT GRAIN EQUIVALENT.

3. OF THE APPROXIMATELY 5 MMT GRAIN REQUIREMENT ABOUT 1.5 MMT
WILL BE WHEAT AND 3.5 MMT FEED GRAINS. FINAL BREAKDOWN OF GRAIN
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FIGURE WILL DEPEND ON PRICE RELATIONSHIPS, I.E. WHETHER MUCH

WHEAT FOR FEED IS IMPORTED. POLISH GRAIN IMPORT REQUIREMENTS FROM U.S. ARE THOUGHT BY CONTACTS TO BE ABOUT LAST YEAR'S LEVEL, I.E., 3.4 MMT WITH ABOUT THE SAME MIX -- 1.1 MMT WHEAT AND 2.3 MMT FEED GRAINS. THIS IMPLIES ONLY A SMALL QUANTITY IS EXPECTED FROM THE USSR WHEN OTHER NORMAL SUPPLIERS ARE TAKEN IN ACCOUNT. ABOUT ONE-HALF OF THE 1 MMT OILSEEDS AND PRODUCTS WILL BE U.S. ORIGIN.

4. POLISH GRAIN PURCHASES THUS FAR FOR 1976/77 SHIPMENT APPEAR TO BE ONLY ABOUT 1.5 MMT, MOST OF WHICH IS FROM THE U.S.(INCLUDING OPTIONAL ORIGIN). POLAND HAS A FLEXIBLE RANGE-TYPE AGREEMENT WITH CANADA BUT INFORMATION ON QUANTITIES COULD NOT BE OBTAINED. APPROXIMATELY 80,000 MT OF DURUM IS EXPECTED TO BE IMPORTED, MAINLY FROM CANADA. ANYWHERE FROM 200,000 TO 300,000 MT OF WHEAT WILL BE IMPORTED FROM SWEDEN, WHICH REPORTEDLY HAS 1 MMT TO EXPORT IN 1976/77. QUALITY OF SWEDISH CROP IS REPORTED EXCELLENT. ALSO UNDER CONSIDERATION IS 200,000 METRIC TONS OF AUSTRALIAN GENERAL PURPOSE WHEAT FOR FEEDING. GOP EXPECTS TO PURCHASE SOME EC WHEAT NEXT SPRING WHEN IT IS THROUGHT RESTITUTIONS WILL RISE.

5. AT THE MOMENT POLAND IS A RELUCTANT BUYER. IMPORT PURCHASES REPORTEDLY COVER THE REMAINDER OF CY 76. BUYERS ARE VERY PRICE CONSCIOUS AND ARE ANTICIPATING FURTHER MARKET DECLINE. THE ONLY WHEAT FOR FEED REPORTEDLY PURCHASED THUS FAR IS 100,000 MT OF U.S. GARLICY SOFT WINTER AT \$117 PER MT -- POLISH PORTS. YELLOW IS CURRENTLY AT \$120 TO \$130 PER MT WITH SORGHUM TEN DOLLARS LOWER WHILE SOFT RED WINTER IS AT \$130 PER MT. CONTACTS CLAIM THEY WOULD NOT PAY MORE FOR FEED WHEAT THAN FOR CORN.

6. IT WAS FELT THAT THE USSR SHOULD DEFINITELY BE ABLT TO EXPORT MORE THAN 2.0 MMT GRAINS DURING 1976/77 DUE TO REDUCED LIVESTOCK REQUIREMENTS. IT WAS FURTHER FELT THAT POSSIBLY AS MUCH AS 5.0 MMT OF SOVIET GRAIN (MAINLY BARLEY) MAY BE EXPORTED CONSIDERING INCREASED EAST EUROPEAN REQUIREMENTS.

7. SUBJECT: PRODUCTION. MINAG MAINTAINS GRAIN PRODUCTION ESTIMATES OF AROUND, BUT NOT MORE THAN 19.0 MMT, OTHER CONTACTS FEEL THIS TO BE CONSERVATIVE AND ESTIMATE SOMEWHAT MORE THAN 1.0 MMT HIGHER. MINAG MAINTAINS LATE SEASON DRAUGHT CONDITIONS ARE RESPONSIBLE FOR REDUCED YIELDS. AGATT PREFERS THE LOWER OF THE ABOVE TWO FIGURES.

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8. THE EARLY POTATO CROP (MAINLY FOR FOOD USE) IS REPORTEDLY LESS THAN NORMAL WHILE THE CONDITION OF THE LARGER MEDIUM AND LATE POTATO CROPS (USED MAINLY FOR FEED) IS SAID TO BE ABOUT AVERAGE. SUGAR BEETS ARE REPORTED TO BE AVERAGE OR ABOVE. FORAGE CROPS ARE REPORTED TO BE BELOW AVERAGE.

9. RECENT RAINS HAVE BROUGHT GOOD WINTER GRAIN SEEDING CONDITIONS AND PLANTING IS ALREADY UNDER WAY.

10. A MAIN TOPIC OF CONVERSATION AT EVERY VISIT WAS THE STATUS AND OUTLOOK OF POLAND'S \$2 HUNDRED MILLION CCC CREDIT APPLICATION. THE LEVEL OF THE CCC CREDIT LINE WILL PLAY A MAJOR ROLE IN 76/77 GRAIN PURCHASES.

11. NOTE G&F DIV FOR NOVOTNY: SINCE VISIT TO CZECHOSLOVAKIA NOT POSSIBLE MURRAY WILL BE RETURNING ON SCHEDULE. PLEASE INFORM MRS. MURRAY.
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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 JAN 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: IMPORTS, AGRICULTURAL PRODUCTION, TRADE DATA, GRAINS
Control Number: n/a
Copy: SINGLE
Draft Date: 23 SEP 1976
Decaption Date: 01 JAN 1960
Decaption Note:
Disposition Action: n/a
Disposition Approved on Date:
Disposition Authority: n/a
Disposition Case Number: n/a
Disposition Comment:
Disposition Date: 01 JAN 1960
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1976WARSAW06848
Document Source: CORE
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: N/A
Errors: N/A
Film Number: D760362-0154
From: WARSAW
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1976/newtext/t19760925/aaaaavki.tel
Line Count: 125
Locator: TEXT ON-LINE, ON MICROFILM
Office: ACTION EB
Original Classification: UNCLASSIFIED
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 3
Previous Channel Indicators: n/a
Previous Classification: n/a
Previous Handling Restrictions: n/a
Reference: n/a
Review Action: RELEASED, APPROVED
Review Authority: greeneet
Review Comment: n/a
Review Content Flags:
Review Date: 26 FEB 2004
Review Event:
Review Exemptions: n/a
Review History: RELEASED <26 FEB 2004 by MaustMC>; APPROVED <07 JAN 2005 by greeneet>
Review Markings:

Margaret P. Grafeld
Declassified/Released
US Department of State
EO Systematic Review
04 MAY 2006

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: POLISH GRAIN SITUATION PASS GRAIN & FEED DIV/FCA AND OILSEEDS AND PRODUCTS/FCA
TAGS: EPAP, EAGR, ETRD, PL
To: STATE
Type: TE
Markings: Margaret P. Grafeld Declassified/Released US Department of State EO Systematic Review 04 MAY 2006